



U.S. General Services Administration

Federal Acquisition Service

Bill of Materials / Statement of Work (BOMSOW)

GSA Training Module Developed for IWAC RBA Extension Project

BOMSOW Training Module Overview

Description: This training module will take you step-by-step through the Bill of Materials/Statement of Work (BOMSOW) document in the Regional Business Application (RBA) IT-Solutions Shop (ITSS) component.

Navigation: If the tutorial opens up in your web browser, simply click your mouse or your space bar to advance to the next slide. Use the “Backspace” key to go back. If the tutorial opens in the PowerPoint application, click on “F5” to view the tutorial. Use the spacebar or click your mouse to advance to the next slide. To go back, click on the “Backspace” key.

BOMSOW Glossary

Term	Definition
BOMSOW	Bill of Materials/Statement of Work
Delivery Date	The Order level Delivery date is the maximum Delivery Date of all active COM task items.
Negotiated Award Date	The final date agreed upon for the order to be awarded.
NAICS Code	North American Industry Classification System; 4-6 digit code.
POP From	Date the Period of Performance begins; minimum start date of all active task items.
POP To	Date the Period of Performance ends; maximum end date of all active task items.
Order Summary	Used to list the order requirements or provide basic instructions for the vendors.
Requirements	File Attachments containing requirements for the order.
LAB	Labor (Fiscal Task Item Type)
COST	COST (Fiscal Task Item Type)
COM	Commodities (Fiscal Task Item Type)
FFP	Firm-Fixed Price (Fiscal Task Item Type)
Approving Official	Optional designation on BOMSOW to require a GSA official (besides the CSR) to approve the winning quote prior to client approval and/or certification of funds.
Publish in e-Buy	Option on the BOMSOW to publish the RFQ to e-Buy using e-Buy Connect.

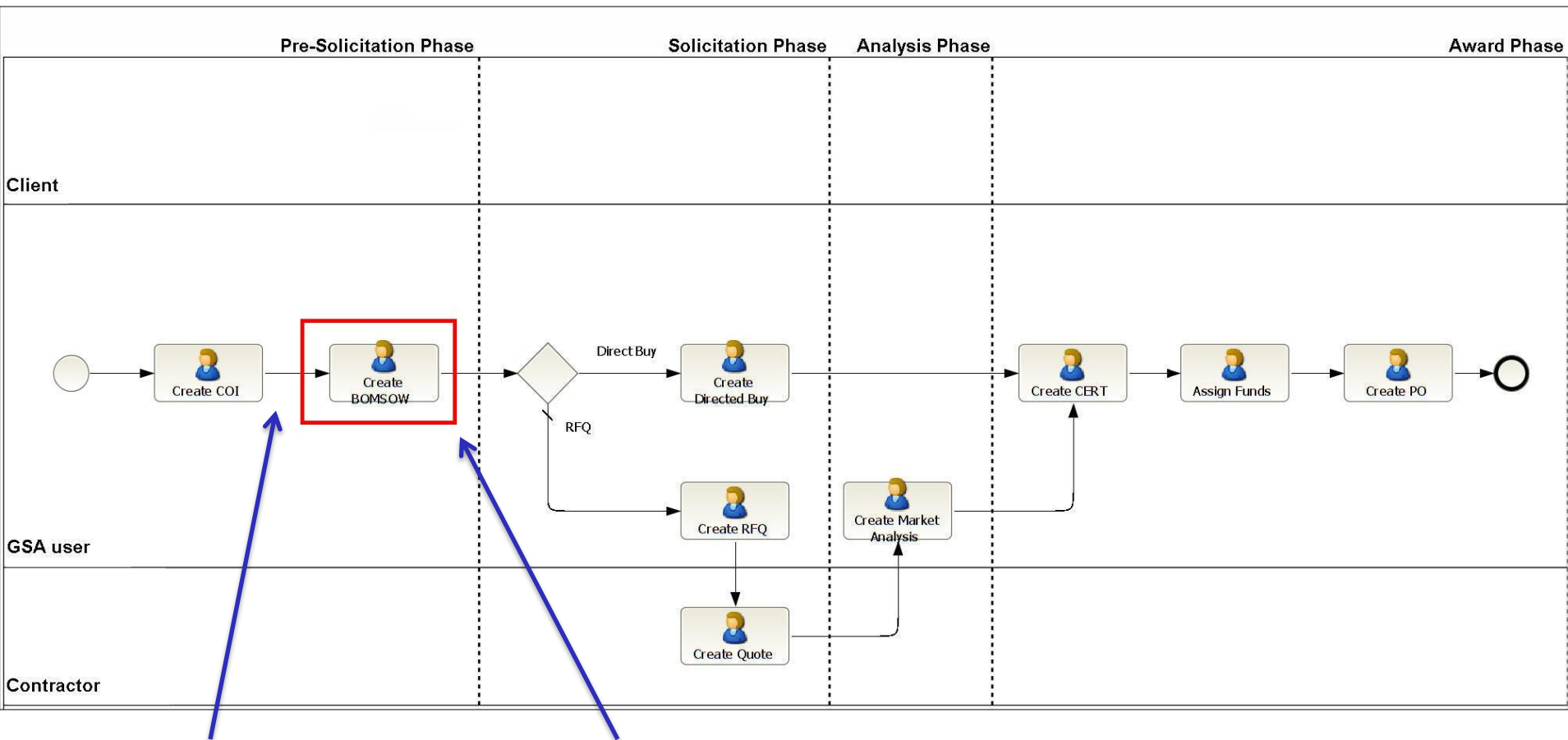
BOMSOW Privileges

User Role Action	Create	Edit	View
GSA Users	✓	✓*	✓
Client			✓
Contractor			✓**

*Limited edit privileges if RFQ is in open state in e-Buy

**Contractors may only view pre-award if on Contractor List

Within the Pre-Award Workflow Context



The BOMSOW is automatically created when the COI is submitted

The BOMSOW is where GSA users select contractors for either the RFQ or Directed Buy and add task items to the order

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You are signed in as Christopher CSR

IT-Solutions

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[WELCOME](#) | **[ORDERS](#)** | [FUNDING](#) | [REGISTRATION](#) | [CONTRACTS](#)

Select a View:
[<<-- View Orders -->>](#) | [<<-- View Inactive Orders -->>](#) | [<<-- View Action Items -->>](#) | [<<-- View Support Information -->>](#)

Go to a Specific View Item: [Create New Order](#)

Orders - Entire Package



Next -> |


- Order Package
 - ID31120022-COI Sarah Client (Organization Name) Directed Buy>>Furniture procurement
 - 00 Chronology
 - 01 Electronic Contract File (ECF)
 - 01 BOM/SOW ID31120022 - 000 Amendment 00 DIRECTED BUY
 - Directed Buy - Revision 00

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Click on the 'BOM/SOW' link in the Order Package View to open an existing BOMSOW in view mode. Only one BOMSOW document exists per order.


▼ GSA Order Support

 All Fields marked with  should be filled in by a GSA Representative.

1. Cust Svc Rep:  Christopher CSR ▼

2. Cust Svc Rep: << Select Customer Service Rep >> ▼

3. Cust Svc Rep: << Select Customer Service Rep >> ▼

Fund Manager:  Francine FM ▼

Contracting Officer: Connie CO ▼

Alt Contract Officer: << Select Contracting Officer >> ▼

► Edit History

[Save As Draft](#) [Submit and Proceed To BOMSOW](#) [Close Without Saving](#)

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After populating required fields on the COI, the GSA user can click on the *Submit and Proceed to BOMSOW* button to create a new BOMSOW which loads in edit mode



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WELCOME

ORDERS

FUNDING

REGISTRATION

CONTRACTS

Bill of Materials / Statement of Work

Save as
Draft

Submit for
GSA Review

Close Without
Saving

All Fields marked with are required.

Submitted By: Christopher CSR at 02/07/2012
Order ID: ID31120022, Mod 000, Version 00, Amendment 00
Client Rep: Sarah Client (Organization Name)
Status: **Draft**

View information about the order

View the BOMSOW status

Format dates as mm/dd/yyyy

Client Project Acceptance Date

BOM/SOW Finalized Date

Customer Funding Received Date

Negotiated Award Date

Enter dates specific to the order

Review the Client Order

Project Descriptor: Furniture procurement

NAICS Code:

Enter the NAICS code

Severable Order?: ☐ Yes ☐ No

Number of Option
Periods (beyond the
base period):

National
Emergency?: ☐ Yes ☒ No

This is a ☐ Yes ☐ No
Performance Work
Statement or
Statement of
Objectives:

Is this order severable?

How many Option Periods (beyond the base period) does this order have?

Is this order for a National Emergency?

Is this a PWS/SOO?

All of these fields are for reporting purposes.



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WELCOME

ORDERS

FUNDING

REGISTRATION

CONTRACTS

Bill of Materials / Statement of Work

Govt. Est

Directed Buy

Request Quote

Edit

Go To Order
Package

Submitted By: Christopher CSR at 02/07/2012
Order ID: ID31120022, Mod 000, Version 00, Amendment 00
Client Rep: Sarah Client (Organization Name)
Status: In-Process
From: *Desired Period of Performance*
 02/15/2012 to 02/29/2012
Date: *Desired Delivery Date*
 02/21/2012
Client Project Acceptance Date
 02/07/2012
BOM/SOW Finalized Date
 02/07/2012
Customer Funding Received Date
 02/07/2012
Negotiated Award Date
 02/07/2012

The order-level Period of Performance and/or Delivery Date is non-editable and derived upon submission of the BOMSOW.

The order-level POP Start date is the minimum POP Start date of all active LAB/COST/FFP task items.

The order-level POP End date is the maximum POP End date of all active LAB/COST/FFP task items.

The order-level Delivery Date is the maximum Delivery Date of all active COM task items.

Review the Client Order

Project Descriptor: Furniture procurement
NAICS Code: 1234
Severable Order?: No
Number of Option Periods (beyond the base period): 0
National Emergency?: No
This is a Performance Work Statement or Statement of Objectives: No

Task Items: Active task items are required to be funded. Inactive task items may be marked active during order modification. Orders must have at least one active task item.


Active ▾	Fiscal Task Type ▾	Item No. ▲	Description ▾	POP From Date ▾	POP To Date ▾	Delivery Date ▾	Remove
No task items have been added.							

Order Summary:

🟡 **AND/OR** - To complete the BOMSOW, you must enter in either an Order Summary (above) or attach one or more requirements document(s) (below). You may use both - one is required.

Requirements:

File Attachments:

 Attach Files

Note the attachments made here will only be visible and accessible to an RFQ in ITSS or an RFI/RFQ in eBuy.

Enter an Order Summary in the text area and/or upload a file attachment with the order's requirements

File attachments have a maximum size limit of 50 MB per file.
File attachments must have a unique filename within the entire order.

Task items are added to the BOMSOW. The BOMSOW must have at least one active task item to submit. Planning of the task item structure on the order is **essential** since users cannot add or remove task items once an RFQ or Directed Buy is created.

Task Items: Active task items are required to be funded. Inactive task items may be marked active during order modification. Orders must have at least one active task item.


Active ▾	Fiscal Task Type ▾	Item No. ▲	Description ▾	POP From Date ▾	POP To Date ▾	Delivery Date ▾	Remove
No task items have been added.							

Order Summary:

AND/OR - To complete the BOMSOW, you must enter in either an Order Summary (above) or attach one or more requirements document(s) (below). You may use both - one is required.

Requirements:

File Attachments:



Note the attachments made here will only be visible and accessible to an RFQ in ITSS or an RFI/RFQ in eBuy.

Click a button to add a task item of that type. A new task item row will be added to the task item table. Contractors will bid on both active and inactive task items.

Mark a task item Active if you want to fund and award it now. Mark a task item Inactive by unchecking the *Active* checkbox. Inactive task items are bid on by the contractor but activated during an Order Mod.

Task Items: Active task items are required to be funded. Inactive task items may be marked active during order modification. Orders must have at least one active task item.

Active	Fiscal Task Type	Item No.	Description	POP From Date	POP To Date	Delivery Date	Remove
<input checked="" type="checkbox"/>	COM	0001	Furniture	n/a	n/a	02/14/2012	
<input checked="" type="checkbox"/>	COM	0002	Seating	n/a	n/a	02/21/2012	
<input type="checkbox"/>	FFP	0003	Installation	02/15/2012	02/29/2012	n/a	

Order Summary

AND/OR - To complete the BOMSOW, you must enter in either an Order Summary (above) or attach one or more requirements document(s) (below). You may use both - one is required.

Requirements **File Attachments:**

Each task item has a Fiscal Task Type of either COM, LAB, COST, FFP, or FEE.

Fee-only task items are not added on the BOMSOW. Fee-only task items are added on either the Market Analysis, Directed Buy, or Order Mod.

only be visible and accessible to an RFC

Each task item must have a unique Item No. to identify the task item within the order. The Item No. is an alphanumeric field with a maximum length of 10 characters.

The Item No. will be displayed on all subsequent documents throughout the order including Purchase Orders. Once the task item is awarded the Item No. cannot be changed.

Enter a description for each task item. The description does not have to be unique.

Depending on the status of the BOMSOW, users can remove an erroneously added task item by clicking the X

Task Items: Active task items are required to be funded. Inactive task items may be marked active during order modification. Orders must have at least one active task item.

Add a COM Task Item

Add a LAB Task Item

Add a COST Task Item

Add a FFP Task Item

Active ▾	Fiscal Task Type ▾	Item No. ▲	Description ▾	POP From Date ▾	POP To Date ▾	Delivery Date ▾	Remove
<input checked="" type="checkbox"/>	COM	0001	Furniture	n/a	n/a	02/14/2012	✕
<input checked="" type="checkbox"/>	COM	0002	Seating	n/a	n/a	02/21/2012	✕
<input type="checkbox"/>	FFP	0003	Installation	02/15/2012	02/29/2012	n/a	✕

Order Summary:

Order summary text.

● **AND/OR** - To complete the BOMSOW, you must enter in either an Order Summary (above) or attach one or more requirements document(s) (below). You may use both - one is required.

Requirements:

File Attachments:



Note the attachments made here are for an RFI/RFQ in eBuy.

LAB, COST and FFP task items must have a POP From date (aka POP Start) and a POP To date (aka POP End).

POP To dates must be after or on POP From dates.

COM task items must have a Delivery Date

If only COM task items are awarded on the basic order then LAB, COST, and FFP task items cannot be added to the order during an Order Mod. The order will be restricted to COM and FEE task items only.

Task Items: Active task items are required to be funded. Inactive task items may be marked active during order modification. Orders must have at least one active task item.

Active	Fiscal Task Type	Item No.	Description	POP From Date	POP To Date	Delivery Date	Remove
<input checked="" type="checkbox"/>	COM	0001	Furniture	n/a	n/a	02/14/2012	
<input checked="" type="checkbox"/>	COM	0002	Seating	n/a	n/a	02/21/2012	

Upon submission of the BOMSOW, the data will be validated.

If the BOMSOW has only active COM task items and does not have an active LAB, COST, or FFP task item then a soft-validation pop-up warning is displayed.



Message from webpage

Basic order legs awarded with only active COM task items will only have the ability to have COM task items added/activated during order modification. Are you sure you want to submit this BOMSOW?

Click here to download a Standard Materials Template

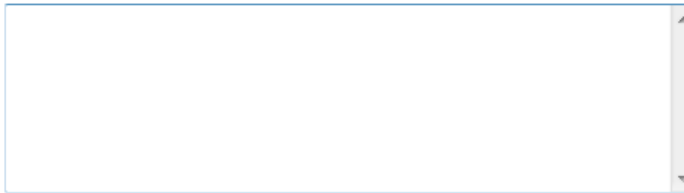
To use Standard Materials Template, [Click Here](#).

If you are requesting a specific supplier, vendor, or brand name product for your order, [Click Here](#).

☐ Use Supplied Template for Quotes

If your order has multiple ship-to addresses, enter them in the box below. These addresses will be copied or referred to on the Purchase Order (GSA Form 300 in Block 20) once the order is awarded.

Multiple Shipping Addresses:



Enter multiple shipping addresses here. They will appear on the Purchase Order form 300.

Special Instructions:

Enter any other special notes you would like to make about the order requirements here.



Publish in e-Buy:

Would you like to publish this opportunity as an RFQ in e-Buy?

☐ Yes ☐ No

If Yes, you will select contractors within e-Buy after you submit the RFQ in ITSS.

Approval Info:

Must the winning quote be approved before this order goes to client approval and funds are certified?

☐ Yes ☒ No

If Yes, select Approving Official's name from the list:

-- Select Approving Official --

GSA users can publish the RFQ in e-Buy or ITSS. Select the appropriate radio button and the BOMSOW will refresh with additional details.

[Edit History](#)

Submit

Close Without Saving

GSA users can select to have a GSA Approving Official approve the winning Quote prior to Client approval (if selected) and certification of funds.

To use Standard Materials Template, [Click Here](#).

If you are requesting a specific supplier, vendor, or brand name product for your order, [Click Here](#).

☐ Use Supplied Template for Quotes

**Multiple Shipping
Addresses:**

If your order has multiple ship-to addresses, enter them in the box below. These addresses will be copied or referred to on the Purchase Order (GSA Form 300 in Block 20) once the order is awarded.

**Special
Instructions:**

Enter any other special notes you would like to make about the order requirements here.

**Publish in
e-Buy:**

Would you like to publish this opportunity as an RFQ in e-Buy?

☒ Yes ☐ No

If Yes, you will select contractors within e-Buy after you submit the RFQ in ITSS.

Sources Sought:

Post as a Sources Sought or Request for Information (RFI) notice?

☐ Yes ☐ No

Contractor List:

Contractor selection is not required in ITSS at this time

Approval Info:

Must the winning quote be approved before this order goes to client approval and funds are certified?

☐ Yes ☒ No

If Yes, select Approving Official's name from the list:

-- Select Approving Official --

If the GSA user selects Yes to Publish in e-Buy then the Sources Sought field is displayed and contractor selection will be performed in e-Buy upon submission of the RFQ. The user will no longer have the option of creating a Directed Buy.

See the RFQ training module for details on e-Buy contractor selection.

▶ **To issue an RFI, select Yes on the Sources Sought field**

Submit

Close Without
Saving

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To use Standard Materials Template, [Click Here](#).
 If you are requesting a specific supplier, vendor, or brand name product for your order, [Click Here](#).

☐ Use Supplied Template for Quotes

Multiple Shipping Addresses: If your order has multiple ship-to addresses, enter them in the box below. These addresses will be copied or referred to on the Purchase Order (GSA Form 300 in Block 20) once the order is awarded.

Special Instructions: Enter any other special notes you would like to make about the order requirements here.

Publish in e-Buy: Would you like to publish this opportunity as an RFQ in e-Buy?
☐ Yes ☒ No

If Yes, you will select contractors within e-Buy after you submit the RFQ in ITSS.

Contractor List: <<----- List ----->>
 Steve Contractor (IT INDUSTRY PARTNERS)

Approval Info: Highlighted entries will be saved. To highlight multiple entries, hold down the control key.
 Must the winning quote be approved before this order goes to client approval and funds are certified?
☐ Yes ☒ No

If Yes, select Approving Official's name from the list:
 -- Select Approving Official --

[Edit History](#)

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If the GSA user selects *No* to Publish in e-Buy then the Contractor List will be displayed and contractors will be selected in ITSS. After the BOMSOW is submitted, the GSA user will have the option of creating an RFQ or Directed Buy.

As the GSA user selects contractors from the pick list they are added to the Contractor List field and *selected* in blue. GSA user should ensure their contractors are highlighted in blue before submitting the BOMSOW. Contractors in the Contractor List but not *selected* will not be issued the RFQ.

Click the *Pick From List* button to display the Contractor Selection list

Enter the first part of the value and click Go to jump directly to the first matching record

Close Window

Select Contractors From The List Below

Change the Sort Value: Contractors by Company ▼

Go To a Specific Value: Test

Next ->

- ▼ Contractors By Company
 - ▶ TEST COMPANY CORP INC
 - ▶ TEST COMPANY914MLP
 - ▶ TESTPROS INC

Click the drop-down arrow to search by another value

Contractors by Company ▼

Contractor Distribution Lists

Contractors by Company


Contractors by Name

Contractors by Contract Number

Click on a blue twistie to view all of the contractors registered under that company

Close Window

Select Contractors From The List Below

Change the Sort Value: Contractor Distribution Lists 

Go To a Specific Value:

<- Previous | Next ->

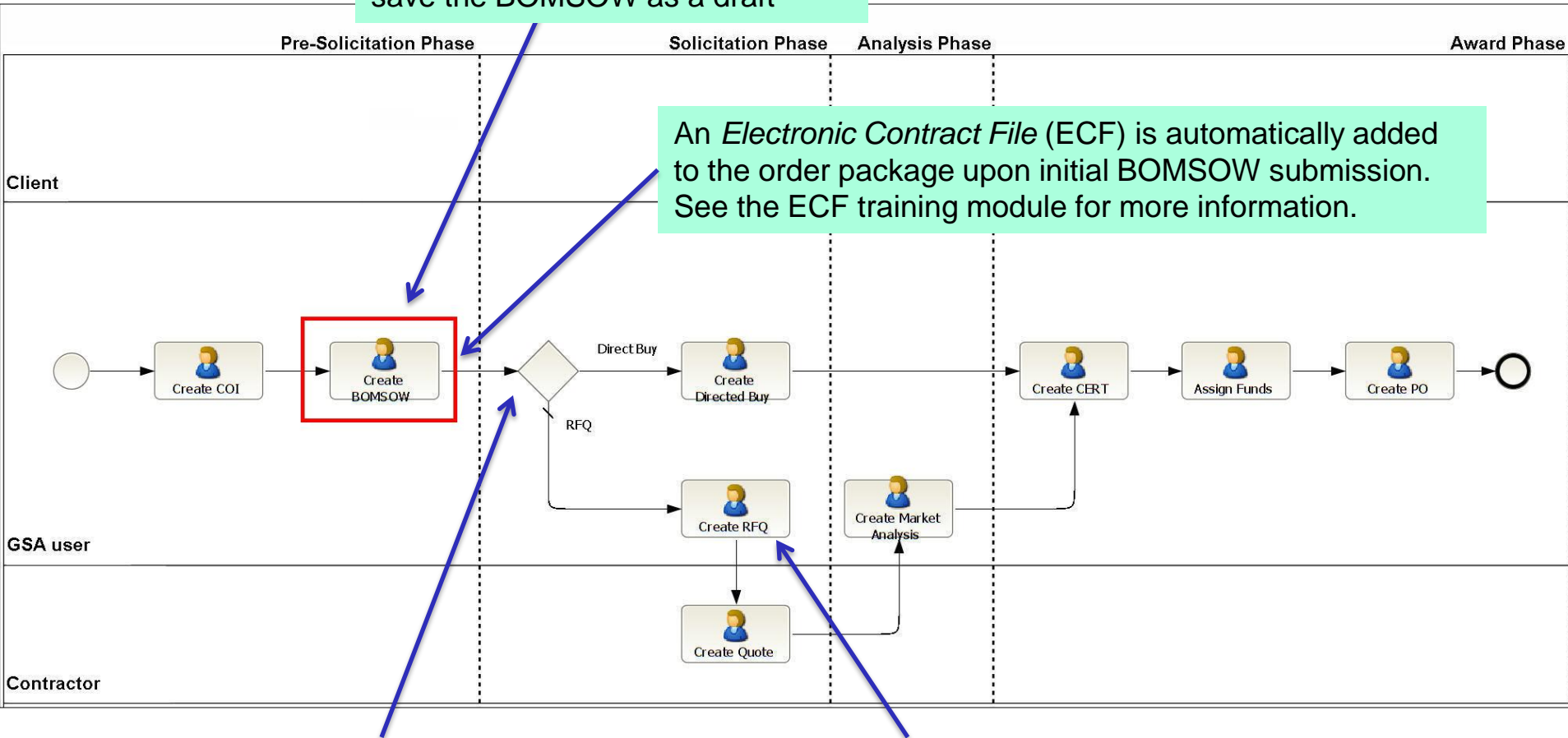
- [add / remove](#) 8A STARS - Functional Area 7A (Must select groups 7A and 7B)
- [add / remove](#) 8A STARS - Functional Area 7B (Must select groups 7A and 7B)
- [add / remove](#) 8A STARS - Functional Area 8A (Must select groups 8A and 8B)
- [add / remove](#) 8A STARS - Functional Area 8B (Must select groups 8A and 8B)
- [add / remove](#) AF NETCENTS
- [add / remove](#) ANSWER Contract Program Managers
- [add / remove](#) COMMITS NexGen GWAC
- [add / remove](#) Connections GWAC - Category 1
- [add / remove](#) Connections GWAC - Category 2
- [add / remove](#) Connections GWAC - Category 3
- [add / remove](#) DSL 1
- [add / remove](#) TIES MAINTENANCE AND MANAGEMENT
- [add / remove](#) LIANT GWAC
- [add / remove](#) iant Small Business GWAC
- [add / remove](#) Packard Design Jet 1050C Printer/Plotter
- [add / remove](#) (1)
- [add / remove](#) (2)
- [add / remove](#) (3)
- [add / remove](#) .BPA
- [add / remove](#) List 5B
- [add / remove](#) Millennia Contract
- [add / remove](#) Millennia Lite - Functional Area 1: Information Technology Planning, Studies and Assessment

The search criteria option *Contractor Distribution Lists* allows GSA users to select all contractors associated with a specific distribution list (i.e. a *Contract Family*) rather than having to select each individual contractor

Example: Clicking *add* for the *ANSWER Contract Program Managers* list will populate the BOMSOW pick list with all contractors associated with this specific contract family

Next Steps...

If a GSA user wishes to select contractors at a later time they can save the BOMSOW as a draft



An *Electronic Contract File* (ECF) is automatically added to the order package upon initial BOMSOW submission. See the ECF training module for more information.

Once the BOMSOW is submitted for GSA Review, the GSA user can proceed with either issuing an RFQ or creating a Directed Buy

RFQs can be published in either ITSS or e-Buy

BOMSOW Status Glossary

Status	Definition
Draft	BOMSOW has been saved but not yet submitted for GSA Review.
In-Process	BOMSOW submission complete. CSR may create a Directed Buy or RFQ, based on e-Buy fields selected on BOMSOW.
Quotes Requested	RFQ has been submitted and RFQ close date is later than current date.
Quotes Process Closed	RFQ close date is earlier than current date. CSR can now create another RFQ or create a Directed Buy.
Market Analysis	A new Market Analysis has been generated.
Directed Buy	A new Directed Buy has been generated.
Analysis Complete	If Approving Official acceptance is required, the Market Analysis has been accepted by an Approving Official.
Accepted	Funds have been Certified in ITOMS.
Awarded	Purchase Order has been signed.

Federal Acquisition Service

Questions & Support

- For questions regarding AAS Policy please contact randy.matlack@gsa.gov or robert.niewood@gsa.gov
- For questions regarding the RBA BOMSOW training module please contact RBA Technical Support:
 - Phone: (877) 472-4877
 - Email: AASBS.helpdesk@gsa.gov

